USDA Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network
Template Version 2.09

Required Report - public distribution

Date: 10/20/2006

GAIN Report Number: E36134

EU-25

Dairy and Products

Annual

2006

Approved by:
Debra Henke
U.S. Mission to the EU

Prepared by:
Yvan Polet

Report Highlights:
EU milk production in 2006 is expected to end one million MT below 2005 levels, despite increases in milk production quota. This is a consequence of a drought, but also as a result of decoupling of dairy subsidies from production. Milk production is not expected to recover significantly in 2007. Cheese production and consumption are expected to increase 1.5 percent in 2006 and another 0.9 percent in 2007. As a result, less milk deliveries will remain available for butter, NFDM and WMP production. While EU domestic consumption for these commodities is expected to remain stable, except for NFDM, which is decreasing as a result of the halt to EU subsidies, the decrease in production is resulting in decreases in exports for butter, NFDM and WMP. Butter intervention stocks are also expected to decrease in 2006 and 2007.
The accession of Bulgaria and Romania are not expected to influence EU dairy markets.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Brussels USEU [BE2]
[E3]

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This report is the result of active collaboration with the following EU FAS colleagues in the member states:

Dana Biasetti from FAS Rome covering Italy
Bob Flach from FAS The Hague covering the Benelux
Michael Hanley from FAS Dublin covering Ireland
Marie-Cecile Henard from FAS Paris covering France
Petra Hrdlickova from FAS Prague covering the Czech Republic
Steve Knight from FAS London covering the United Kingdom
Roswitha Krautgartner from FAS Vienna covering Austria
Hasse Kristensen from FAS Copenhagen covering Denmark
Asa Lexmon from FAS Stockholm covering Estonia, Finland, Latvia and Sweden
Sabine Lieberz from FAS Berlin covering Germany
Jana Mikulasova from FAS Prague covering the Slovak Republic
Andreja Misir, from FAS Zagreb covering Slovenia
Ferenc Nemes from FAS Budapest covering Hungary
Leonor Ramos from FAS Lisbon covering Portugal and Spain
Piotr Rucinski from FAS Warsaw covering Lithuania and Poland

Executive Summary

Underutilization of the milk quota as a result of low profitability in milk production is increasingly an issue in the European Union. Milk production will continue to fall short in the future and have consequences for farmers in terms of profitability and competitiveness. At the same time, the European Union dairy regime will likely be scrutinized in the 2008 "Health Check" for the 2003 Common Agricultural Policy (CAP) reform. Finally, dairy will be further impacted in the European Union as Bulgaria and Romania have the green light to accede to the European Union on January 1, 2007. This accession is expected to enhance the need for changes in the CAP. See the policy section at the end of this report.

EU milk production is decreasing by one million MT in 2006 compared to 2005, despite increases in EU production quota in the EU-15 and the activation of milk quota reserves in the New Member States (NMS). EU milk production in 2007 is forecast to recover only marginally.

Cheese production has been the most profitable activity for European dairy processors in recent years and therefore EU cheese production swiftly followed increasing demand from European consumers in 2006, despite decreased milk deliveries. As cheese consumption is forecast to further increase in 2007, albeit at a slower pace, EU cheese production is forecast to increase by another 0.9 percent.

As a consequence, milk supplies for other dairy products has dwindled in 2006, resulting in significant decreases in EU butter production (-5 percent) and Non-Fat Dry Milk (NFDM). The decrease in EU butter production in 2006 is leading to lower butter ending stocks and decreasing butter exports, despite increases in export refunds. EU butter exports in 2006 are losing a third of its previous butter markets as a result of high EU butter prices and strong competition from butter from Oceania, especially in Middle Eastern markets, where consumers have turned away from Scandinavian dairy products in reaction to the Danish cartoons. EU domestic butter consumption is maintained at a high level. In 2007, this decreasing trend in butter production, export and ending stocks is forecast to continue, as cheese production is decreasing milk supplies further.

EU NFDM production in 2006 is significantly decreased, despite a decrease in casein production, as a result of the end of the aid for casein processing. EU NFDM exports in 2006 are expected to end a third below 2005 levels, as a result of short supplies and the ending of export refunds for NFDM. NFDM domestic consumption is also decreasing because of the decrease and ultimate halt to the aid for NFDM use in feed. EU intervention stocks of NFDM have run completely empty during 2006, resulting in zero ending stocks. In 2007, NFDM production is forecast to further decrease, resulting in lower exports and decreases in domestic consumption.

EU Whole Milk Powder (WMP) production is decreasing in 2006 too, because of reduced exports to the Middle East, as a result of strong competition from Oceania, and despite stable domestic consumption. The EC has increased its export subsidies for WMP in a bid to support WMP exports as an interesting option to export milkfats. Nevertheless, WMP exports, and hence production, are forecast to further decrease in 2007.

Milk

Country:	EU-25					
Commodity:	**Dairy, Milk** (1000 Head / 1000 MT)					
	2005		2006		2007	
	Old	New	Old	New	Old	New
Calendar Year Begin	01/2005		01/2006		01/2007	
Cows In Milk	23,533	23,400	22,677	22,974	0	22,700
Cows Milk Deliveries to Dairies	132,027	131,652	132,300	130,500	0	130,600
Other Milk Production	4,770	4,526	4,760	4,525	0	4,553
Total Milk Production	136,797	136,178	137,060	135,025	0	135,153
Extra EU25 Imports	9	9	10	13	0	10
TOTAL SUPPLY	**136,806**	**136,187**	**137,070**	**135,038**	**0**	**135,163**
Extra EU25 Exports	150	132	150	135	0	135
Fluid Use Dom. Consum.	34,027	34,064	34,100	34,079	0	34,140
Factory Use Consum.	102,629	101,991	102,820	100,824	0	100,888
Feed Use Dom. Consum.	0	0	0	0	0	0
Total Dom. Consumption	136,656	136,055	136,920	134,903	0	135,028
TOTAL DISTRIBUTION	**136,806**	**136,187**	**137,070**	**135,038**	**0**	**135,163**

Sources: FAS EU offices, Global Trade Atlas

2005

Milk production in CY2005, as reported by Eurostat, turned out to be lower than previously estimated. Despite this, 10 EU MS are facing total levies of €377 million for exceeding milk quotas in the quota year 2005/06 (April-March). More than 90 percent of the levy is accounted for by 3 MS: Italy, Poland[1] and Germany[2]. As several MS seem to be currently reviewing cattle numbers, EU December census numbers were used for the cows in milk number. Final EU milk export numbers were lower than anticipated. Milk for factory use was also decreased from the previous estimate.

2006

EU milk production is expected to decrease by 0.5 percent in 2006 compared to 2005, despite a 0.5 percent increase in quota in most of the EU-15 and the activation of the quota reserves in the NMS. Milk production in 2006 is decreasing in France, Germany, Ireland, Italy, Spain and the United Kingdom. Several reasons are at the basis of this decrease in the different MS. The hot summer and consequent drought have impacted forage supplies and hence milk production in the southern half of Europe. Historically high beef prices have also seduced some farmers in France to sell more cows for slaughter. The decoupling of dairy aid from milk production has removed the need to produce milk from less efficient producers in Germany and the United Kingdom, while other MS, which produced over their production quota in 2005, are trying to avoid paying superlevies for overshooting their milk production quota in 2006. Poland is the exception to this trend with further production increases, thanks to EU's decision on partial re-allocation of direct sales quota to wholesale quota in 2005 and addition of restructuring quota in 2006 (see GAIN PL6065). Poland is increasingly exporting raw milk and cream for further processing to Germany and The Netherlands at the expense of the export of processed dairy products. This trend is also occurring in the Czech

[1] GAIN PL6065
[2] GAIN GM6039

Republic. A number of Polish dairy processors are still struggling to meet EU sanitary quality standards before the end of 2006 deadline. As a result of the decrease in EU milk production, about a one percent decrease in milk for factory use is anticipated.

2007

EU milk production is forecast to recover only slightly in 2007, despite another 0.5 percent increase in production quota in the EU-15 as agreed in the 2003 CAP reform. The expectation is that EU milk production may not fill EU milk production quota anymore in a structural way in the coming years, as more MS decouple subsidies to dairy farmers. This is expected to lead to farmer decisions to not fill their milk production quota because of low profitability. Decreases in milk production are forecast in Austria, Italy, Hungary, the United Kingdom and in the Scandinavian countries. Exceptions to this decreasing trend are Poland, but also the Czech and Slovak Republics, which are forecast to reverse the decreasing trend in milk production after EU accession. As a result of these milk production developments, milk supplies for factory use are forecast to stagnate. Consumption of fluid milk is forecast to slightly increase because of increased consumption in NMS and a favorably changing consumption pattern in Portugal.

Cheese

Country:	EU-25					
Commodity:	Dairy, Cheese (1000 MT)					
	2005		2006		2007	
	Old	New	Old	New	Old	New
Calendar Year Begin	01/2005		01/2006		01/2007	
Beginning Stocks	0	0	0	0	0	0
Production	6,500	6,480	6,580	6,580	0	6,640
Extra EU25 Imports	95	95	90	85	0	80
TOTAL SUPPLY	**6,595**	**6,575**	**6,670**	**6,665**	**0**	**6,720**
Extra EU25 Exports	490	492	480	495	0	495
Domestic Consumption	6,105	6,083	6,190	6,170	0	6,225
Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	6,105	6,083	6,190	6,170	0	6,225
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	**6,595**	**6,575**	**6,670**	**6,665**	**0**	**6,720**

Sources: FAS EU offices, Global Trade Atlas

2005

Updated cheese production numbers were slightly lower than previously anticipated. This resulted in a slightly lower domestic consumption number.

2006

EU cheese production is increasing in 2006 by 1.5 percent, despite the decrease in milk production. This increase in production is the result of a 1.5 percent domestic consumption increase EU wide, except in France where the cheese market is saturated, resulting in stagnating cheese consumption. Another reason for the increased production of cheese is the phasing out of the support for butter and milk powders. The sector believes that cheese will be the main dairy product, which the EU can compete with on the world market. Cheese production is increasing in both EU-15 and NMS. However, higher increases in consumption

make the NMS to expanding markets for cheeses from the EU-15. Production of cheeses from sheep and goat milk are showing particularly strong growth. Imports of cheese are slightly decreasing, mainly from Australia. Imports from the United States, albeit small, seem to continue to increase. EU cheese exports are stable. Increased exports to Russia, mainly from the Benelux and France, are offsetting lost exports to the Middle East resulting from the Danish cartoon row, as well as decreasing exports to the U.S. and Japan.

Whey and whey powder concentrate (WPC)

An additional factor, which supports cheese production, is the high prices for whey and whey derivates. Prices for whey and whey derivates increased due to increased demand by the food and feed industry, partly due to the limited availability of NFDM on the EU market. WPC 34 is commonly used as replacement of NFDM in the feed and ice cream industry as it has about the same protein content. Also production of demineralized and delactosed whey is expected to remain on a high level in order to fulfill the demand by the feed and food industry. As a consequence of the increased production of these whey derivates, production of common sweet whey powder is expected to decline. Another reason for the high prices of whey and whey derivates is that the availability of whey proteins is expected to decline in the EU as the production of casein whey is on a lower level than previous year. The lower availability of casein whey is partly offset by the higher production of whey produced as by-product from cheese production. Beside EU production of common sweet whey powder, also production of WPC 80 is believed to have declined. WPC 34 production gives reportedly a better return on profits at this moment. As a result, traders report increased imports of WPC 80, despite the high tariff for this product. For more information please see GAIN Report NL6039 - EU market for whey derivates.

2007

Increased cheese consumption is forecast to remain the driving force for further increases in cheese production in 2007. However, increases in cheese production and consumption are forecast to level of to a 0.9 percent increase. Cheese imports are forecast to loose some further market share, while cheese exports are forecast to remain stable, as recovery of lost markets in the Middle East is slow.

Butter

Country:	**EU-25**					
Commodity:	**Dairy, Butter** (1000 MT)					
	2005		**2006**		**2007**	
	Old	New	Old	New	Old	New
Calendar Year Begin	**01/2005**		**01/2006**		**01/2007**	
Beginning Stocks	232	232	184	185	0	160
Production	2,155	2,155	2,130	2,065	0	2,050
Extra EU25 Imports	85	80	85	80	0	80
TOTAL SUPPLY	**2,472**	**2,467**	**2,399**	**2,330**	**0**	**2,290**
Extra EU25 Exports	340	342	280	230	0	220
Domestic Consumption	1,948	1,940	1,939	1,940	0	1,940
Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	1,948	1,940	1,939	1,940	0	1,940
Ending Stocks	184	185	180	160	0	130
TOTAL DISTRIBUTION	**2,472**	**2,467**	**2,399**	**2,330**	**0**	**2,290**

Sources: FAS EU offices, Global Trade Atlas

2005

Butter numbers were updated from previous estimates. Butter imports ended slightly below previous estimates and this resulted in slightly lower butter consumption than previously anticipated.

2006

Expectations for EU butter production are reviewed significantly downwards from previous forecasts, as a consequence of decreased milk supplies and the increase in cheese production. EU butter production in 2006 is currently expected to end about 5 percent below 2005 production levels. Butter imports are not expected to have suffered on year basis from the temporary halt on imports of New Zealand butter under a EU import quota, after the European Court had judged that the import quota rules were discriminatory. EU butterfat exports in 2006 are expected to decrease about 30 percent compared to 2005, mainly as a result of the collapse of butteroil exports, because of strong competition from Oceania, and despite several increases in export refunds in the past months. Branded butter exports have been suffering marginally, mainly in the Middle East from the Danish cartoon story. Increased butter exports, from Poland, Finland and to a minor extent the Baltic states, to Russia are offsetting part of the losses in EU export markets in the Arab world. France is a net importer of butter, but was an important exporter of butteroil. As a result of the significant loss of French butteroil exports, more butter is directed to the internal market at the expense of butter imports from other EU MS. EU domestic consumption of butter remains high. Despite the loss in butter exports, the significant decrease in butter production is expected to lead to reduced stocks.

2007

EU butter production is forecast to further decrease in 2007, because the increase in cheese production is forecast to diminish remaining fresh milk supplies further. Imports are forecast to remain stable, as well as domestic consumption. EU butter exports are forecast to loose markets further, because of strong competition of butter from Argentina and Oceania. Nevertheless, EU butter ending stocks in 2007 are forecast to decrease by another 30 thousand MT to 130 thousand MT.

Non-Fat Dry Milk (NFDM)

Country:	EU-25					
Commodity:	Non Fat Dried Milk (1000 MT)					
	2005		2006		2007	
	Old	New	Old	New	Old	New
Calendar Year Begin	01/2005		01/2006		01/2007	
Beginning Stocks	77	77	8	8	0	0
Production	1,094	1,075	1,060	975	0	940
Extra EU25 Imports	7	7	15	12	0	10
TOTAL SUPPLY	**1,178**	**1,159**	**1,083**	**995**	**0**	**950**
Extra EU25 Exports	197	195	185	130	0	120
Domestic Consumption	973	956	898	865	0	830
Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	973	956	898	865	0	830
Ending Stocks	8	8	0	0	0	0
TOTAL DISTRIBUTION	**1,178**	**1,159**	**1,083**	**995**	**0**	**950**

Sources: FAS EU offices, Global Trade Atlas

2005

Updated EU NFDM production numbers were lower than previously anticipated, mainly in Germany, because production decreased at the end of 2005. This resulted in a lower domestic consumption number.

2006

For 2006, EU NFDM production expectations were decreased by some 10 percent from previous estimates. This is a consequence of the large reduction in butter production, partly offset by an estimated 20 percent decrease in EU casein production. Casein production decreased significantly because of the halt of EU support for casein processing. NFDM exports are decreasing by 30 percent compared to 2005; because of no export refunds are available anymore for NFDM exports. EU domestic consumption of NFDM is also decreasing, especially in the EU-15, because of the progressive decrease in EU aid for use of NFDM in feed, which was ultimately halted by the end of September 2006. NFDM intervention stocks were also completely depleted in 2006.

2007

NFDM production is forecast to further decrease in 2007, in line with the decrease in butter production. Production of casein is not forecast to recover in 2007. NFDM exports are forecast to further decrease, as a result of competition from Argentina and Oceania. EU domestic consumption of NFDM is also forecast to further decrease, as no aid for NFDM disappearance is available anymore. No stocks are anticipated to build in the EU in 2007.

Whole Milk Powder (WMP)

Country:	EU-25					
Commodity:	Dairy, Whole Milk Powder (1000 MT)					
	2005		2006		2007	
	Old	New	Old	New	Old	New
Calendar Year Begin	01/2005		01/2006		01/2007	
Beginning Stocks	0	0	0	0	0	0
Production	840	840	840	790	0	770
Extra EU25 Imports	2	2	2	1	0	1
TOTAL SUPPLY	**842**	**842**	**842**	**791**	**0**	**771**
Extra EU25 Exports	490	494	470	440	0	420
Domestic Consumption	352	348	372	351	0	351
Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	352	348	372	351	0	351
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	**842**	**842**	**842**	**791**	**0**	**771**

Sources: FAS EU offices, Global Trade Atlas

2005

An update of 2005 numbers from previous estimates only featured a slight increase of WMP exports at the expense of domestic consumption.

2006

EU WMP production in 2006 is expected to decrease by 6 percent from 2005. This will be the consequence from expected decreases in WMP exports in response to the EC decision to systematically reduce export refunds to zero over the course of the summer of 2006 and strong competition from WMP from Oceania. Sweden is the exception, increasing WMP production, as the conversion of an NFDM plant to produce WMP reached full capacity. Increasing exports of WMP to central Africa are not offsetting losses of WMP markets in the Middle East, which have been enhanced by the Danish cartoon problems. The EU domestic market for WMP shows little or no elasticity.

2007

WMP production in the EU is forecast to further decrease in 2007, as EU WMP exports are being further eroded by competition from Oceania.

Policy

Role of the EU milk production quota if underfill becomes structural?

While it was the summer drought that is triggering the current underfill of milk production quota in several MS in 2006, the underutilization of the milk production quota started a few years ago when farmers in France and the United Kingdom stopped filling their individual production quota because of low profitability. Because the decoupled aid to farmers is to offset decreasing milk prices to producers, more farmers will face low milk production profitability. As a result, more farmers can be expected to stop fully using their milk production quota and this number will increase as more EU MS implement dairy aid decoupling.

Unlike EC prospects[3], some industry forecasts say that in 2007 also EU milk production will fall short of the EU milk production quota, as well as in the next years. As a result, milk production quota underfill could become structural and the main purpose of the quota, to cap EU milk production, would be lost. However, the milk production quota would continue to have an impact. Because milk production quota are attributed to MS or even regions within MS, the quota system limits geographical shifting of milk production rights to the actual quota area. Milk producers in geographically disadvantaged areas will cling to the quota system as a way to preserve milk production in their area, as they would otherwise be pushed out of business by producers in more favorable areas.

The milk quota regime could show some undesirable side effects. Efficient dairy farmers in favorable production area face a serious dilemma. They can not expand milk production to become even more efficient unless they acquire additional production quota, but available quota are scarce. Dairy farmers also face the problem that new investments in expensive new milk production quota should be considered a loss, at the utmost by the expiration of the current quota regime in 2014. This could result in a loss of profit and competitiveness for these dairy farmers. If this happens, as a consequence of underperforming milk deliveries, EU dairy processors will lose business, profit and become even less competitive in the world market.

The 2008/2009 "Health check": what's in it for EU dairy markets?

In the 2003 CAP Reform, which originally was defined as a Mid-term Review for the Agenda 2000 Reform, as well as in the sugar reform, it was agreed to do a mid-term review for the proper functioning of the reform implementation in 2008, now dubbed "Health Check". In the December 2005 Financial Perspectives agreement, a mid-term review of the EU budget situation was agreed. Over the past two years it has become clear that the dairy reform, beside the grain intervention system, would need some additional tuning. The future EU butter balance has become a reason for concern, as butter intervention stocks were not decreasing as hoped for by the drafters of the dairy reform. Concerns were seriously enhanced by the EU proposal in the Doha trade negotiations to bring export refunds to a halt by the end of 2013. Although the 2006 summer drought has brought some short-term relief to the EU butter balance, it hasn't fundamentally solved the EU butter balance problem. On the contrary, as described above, the drought has only highlighted another even more fundamental problem for the EU dairy regime.

European Commissioner Mariann Fischer-Boel (MFB) has been giving some hints about the options the EC is pondering to mitigate problems with the dairy regime in the Health Check. One is the abolition of production quota, as highlighted in MFB's speech for the "A Simple

[3] http://ec.europa.eu/agriculture/publi/caprep/prospects2006/fullrep.pdf

CAP for Europe"[4] conference in Brussels in early October of 2006. Another option is the abolition of EU intervention buying, as highlighted in MFB's speech for the recent Congress of European Farmers "Promoting the Competitiveness of European Agriculture" [5]. Both options combined would de facto make the EU dairy market virtually liberalized, as all aid for milk proteins has already been halted and little aid for milkfat would be available after the abolition of export refunds. The only protection remaining would consist of the import tariffs to limit dairy imports. MFB also highlighted in her speech on a "European Model of Agriculture"[6], that she wouldn't allow the budget mid-term review to be used to ditch the CAP completely, although her speech on "A Simple CAP for Europe" [7] did point to some possible modifications to the CAP. Her plead for a single Common Market Organization (CMO) supported abolishing both the milk quota regime and intervention, as both mechanisms only still exist for the dairy sector, while the cereal and the sugar sectors still use one of these mechanisms.

Impact of Bulgaria and Romania acceding to the EU.

In late September, the EC recommended that Bulgaria and Romania could join the EU on January 1, 2007. However, this political decision does not mean that these countries have met all EC requirements for accession. They have not yet met EU requirements, specifically in the agricultural and veterinary domains, and will therefore face restrictions in receiving CAP aid and exporting agricultural products to the rest of the EU.

Bulgaria and Romania combined will add about 2 million dairy cows to the EU herd or about 8.7 percent. However, 80-90 percent of dairy cows are on one-cow subsistence farms and, as a result, milk deliveries to the dairy industry in Bulgaria and Romania will have a negligible impact on the EU dairy market. The veterinary shortcomings on dairy farms, as well as failure to meet EU hygiene standards in dairies, are expected to reduce milk deliveries in the short term. Furthermore, rapid consolidation of farms and the industry can be anticipated in the coming years, just as happened in the NMS-10 in recent years. As a result, Bulgaria and Romania are expected to become export destinations for EU dairy products. This is expected to build only gradually, as purchase power of consumers in these two new EU member states is limited. Goat and sheep cheese production in Bulgaria might have some impact on this market. See GAIN report BG6009.

4 http://europa.eu/rapid/pressReleasesAction.do?reference=SPEECH/06/556&format=HTML&aged=0&language=EN&guiLanguage=en

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